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ABSTRACT

This is one of a series of reports which provide definitions of and descriptive data on the variables used in the Comparative Study of Phase IV of the Individually Guided Education (IEG) Evaluation Project. Phase IV investigated three curriculum programs specifically designed to be compatible with instructional programming for the individual student: (1) the Wisconsin Design for Reading Skills Development (WDRSD); (2) Developing Mathematical Processes (DMP); and (3) Prereading Skills (PRS). Information on instructional methods and pupil outcomes for grades 2 and 5 was collected from achievement monitoring and domain referenced tests, teacher logs, and classroom observations. Information on background, organizational, and program variables came from questionnaires completed during structured interviews with principals, unit leaders, and teachers. This paper focuses on six background variables: Demographic Background, Teacher Experience, Interorganizational Relations, Procedures Fostering Coordination and Development of the School Program, Intraorganizational Structure, and General Implementation of the Instructional Programming Model. For each variable, the report includes a verbal definition, a list of the questionnaire items from which the variable was developed, a detailed explanation of the scaling procedures, and a description of the distribution of the variable in the 19 participating schools. (Author/BS).

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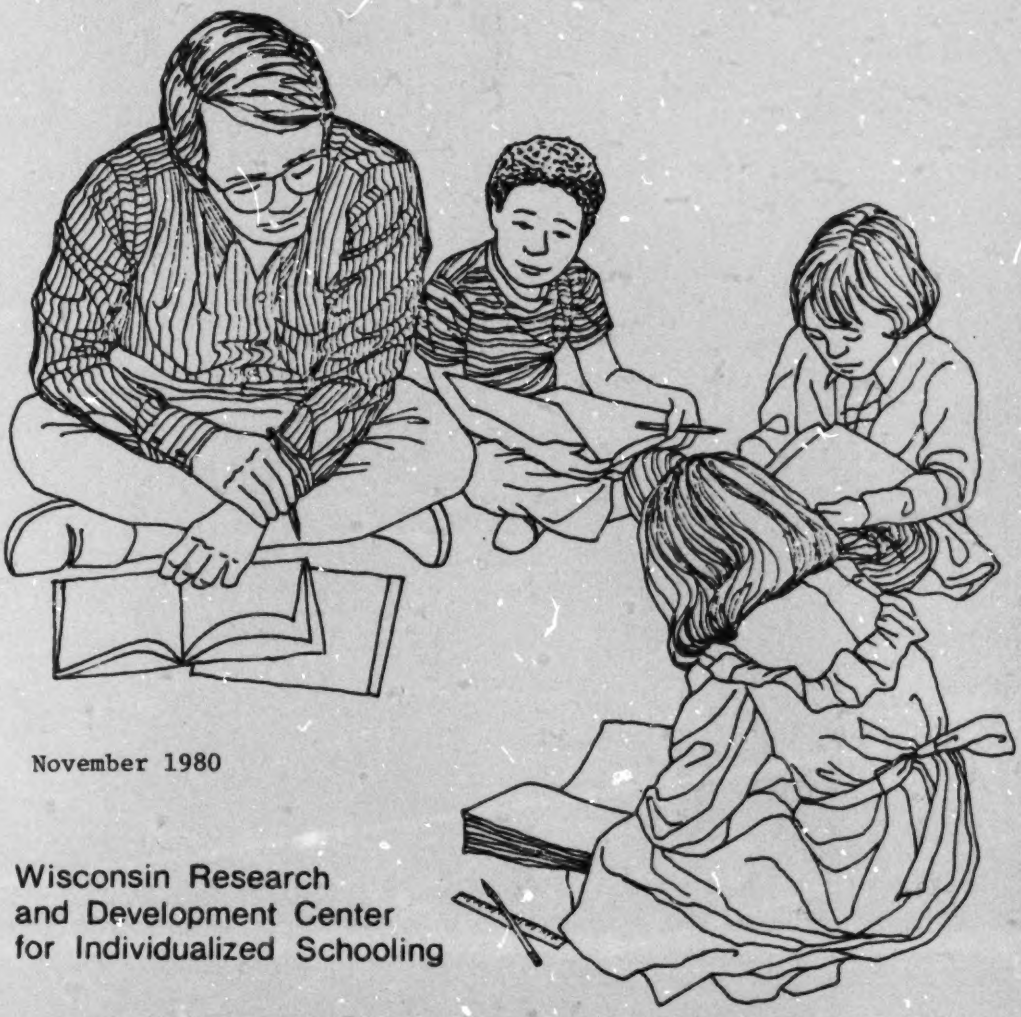
Phase IV

Project Paper 80-7

SCHOOL BACKGROUND VARIABLES

COMPARATIVE STUDY OF PHASE IV IGE EVALUATION PROJECT

by Anne G. Nerenz, Norman L. Webb, and Deborah M. Stewart



November 1980

Wisconsin Research
and Development Center
for Individualized Schooling

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Phase IV

Project Paper 80-7

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Anne G. Nerenz, Norman L. Webb

and

Deborah M. Stewart

Report from the
IGE Evaluation Project

Thomas A. Romberg
Work Group Chairman

Wisconsin Research and Development Center
for Individualized Schooling
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November 1980

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- conducting and synthesizing research to clarify the processes of school-age children's learning and development
- conducting and synthesizing research to clarify effective approaches to teaching students basic skills and concepts
- developing and demonstrating improved instructional strategies, processes, and materials for students, teachers, and school administrators
- providing assistance to educators which helps transfer the outcomes of research and development to improved practice in local schools and teacher education institutions

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WISCONSIN RESEARCH AND DEVELOPMENT
CENTER FOR INDIVIDUALIZED SCHOOLING

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Abstract

This report is one in a series of papers which provide definitions of, and descriptive data on, the variables used in the Comparative Studies of Phase IV of the IGE Evaluation Project. Specifically, it focusses on six background variables: Demographic Background (DB), Teacher Experience (TE), Interorganizational Relations (IOR), Procedures Fostering Coordination and Development of the School Program (GOS), Intraorganizational Structure (IOS), and General Implementation of the Instructional Programming Model (IPM). For each of these variables, the report includes a verbal definition, a list of the questionnaire items from which the variable was developed, a detailed explanation of the scaling procedures and a description of the distribution of the variable in the 19 participating schools.

The IGE Evaluation Project has as a central objective the indentification of features of IGE schooling which contribute to successful instruction, especially in reading skills and mathematics. Although the first four phases of this project focussed on different aspects of IGE, they were designed to provide complementary data bases resulting in a comprehensive description of this form of schooling. With this goal in mind, Phase IV was designed to supplement information collected in Phases I and III by providing detailed information on a small number of curricular and instructional variables. That is, whereas these phases investigated organizational, system, general means of instruction, and general achievement variables, the main purpose of Phase IV was to investigate the three R & D Center-produced curriculum programs whose instructional procedures and materials were specifically designed to be compatible with instructional programming for the individual student. These programs are the Wisconsin Design for Reading Skills Development (WDRSD) (Otto, 1977), Developing Mathematical Processes (DMP) (Romberg, 1977), and Prereading Skills (PRS) (Venezky & Pittelman, 1977).

Phase IV was composed of five studies--three Descriptive Studies and two Comparative Studies. Information on the design and procedures used during each portion may be found in Project Papers 79-42 and 80-2 (Webb & Romberg, 1979; Webb, Romberg, Stewart, & Nerenz, 1980).

Briefly, each part was designed to provide detailed information on two variables--means of instruction and pupil outcomes--using achievement monitoring and domain referenced tests, teacher logs, and classroom observations. In addition, a smaller amount of information on background, organizational, and program variables was obtained from structured interviews with principals, unit

leaders, and teachers. These interviews were based on questionnaires composed of key questions from the set of Phase I questionnaires; key questions are those heavily weighted in the scaling of particular Phase I variables. In each school participating in the comparative studies an interview was conducted with the principal, one unit leader at each of grades 2 and 5, and at least one teacher at each of those grades.

Interview responses are used as the basis for the six variables discussed in this paper: Demographic Background (DB), Teacher Experience (TE), Interorganizational Relations (IOR), Procedures Fostering Coordination and Improvement of the School Program (COS), Intraorganizational Structure (IOS), and General Implementation of the Instructional Programming Model (IPM).

This paper reports development of background variable scores for the two Comparative Studies, one for DMP and one for WDRSD. In Section II the Phase I and Phase IV models are presented. Section III includes formal definitions of the variables and scores of schools in the Comparative Studies. Scaling procedures are detailed in Section IV. Questionnaire items are given in the Appendix.

A Comparison of the Phase I and Phase IV Models

A structural model for predicting student achievement was developed for Phase I and is shown in Figure 1 (Price, Janicki, Howard, Stewart, Buchanan, & Romberg, 1978). This model was developed from the three premises on which IGE is based. They are:

1. Certain organizational features make it more likely that certain desirable instructional practices will occur. These organizational features also make it more likely that the staff will be satisfied with their jobs.

2. The use of certain curriculum materials and associated systems of information collection and record keeping makes it more likely that certain desirable instructional practices will occur.

3. Those instructional practices which are deemed desirable in IGE make high student achievement more likely. They also make it more likely that desirable changes in other student characteristics, such as self-perception and locus of control, will occur.

Data on the first premise were organized into six variables: Interorganizational Relations (IOR), Procedures Fostering Coordination and Improvement of the School Program (GOS), Intraorganizational Structure (IOS), General Staff Background (GSB), Belief in Individual Differences (INDIV), and General Implementation of the Instructional Programming Model (IPM). These describe in detail the organizational structure and staff background in the school. Four variables were developed in response to the second premise. These are: Utilization of Curriculum Resources (UCR), Information Acquisition (IA), Individualization of Instructional Decisions (IDM), and Management of Grouping and of Instructional Continuity (IE). A single variable -- Student Achievement-- (SA) represents the pupil outcomes discussed in the third premise. With the exception of the achievement measures, data on all of the variables in the Phase I model were collected using unit teacher, unit group, general staff, and school governing group questionnaires.

In contrast, Phase IV was designed to provide more detail on the last two premises posed in Phase I, with specific attention paid to means of instruction and curriculum-related student achievement. In addition, sufficient background information was obtained so that each school in the smaller Phase IV sample might

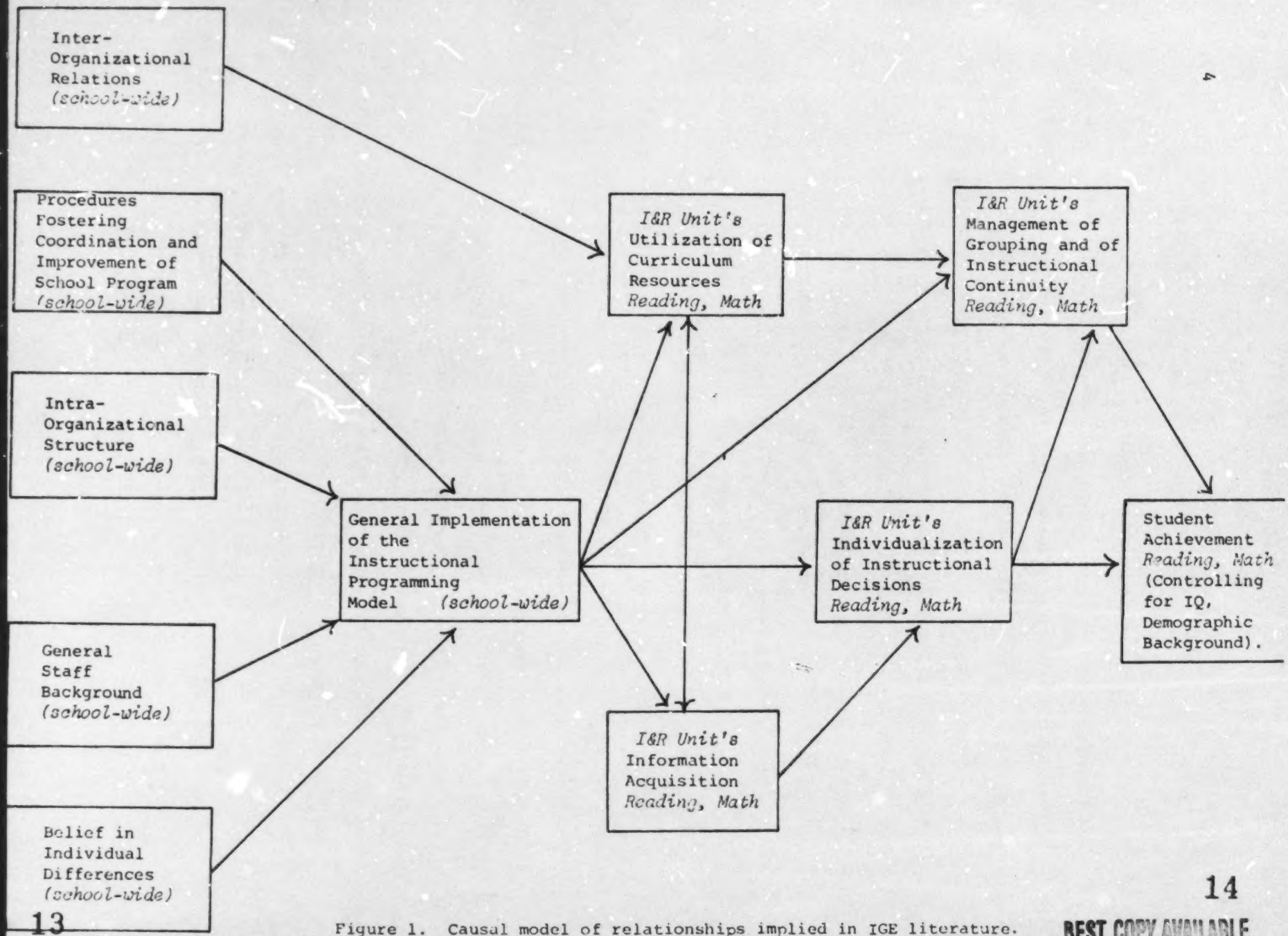
Inter-Organizational Relations (school-wide)
Procedures Fostering Coordination and Improvement of School Program (school-wide)
Intra-Organizational Structure (school-wide)
General Staff Background (school-wide)
Belief in Individual Differences (school-wide)
General Implementation of the Instructional Programming Model (school-wide)
I&R Unit's Utilization of Curriculum Resources Reading, Math
I&R Unit's Information Acquisition Reading, Math
I&R Unit's Individualization of Instructional Decisions Reading, Math
I&R Unit's Management of Grouping and of Instructional Continuity Reading, Math
Student Achievement Reading, Math (Controlling for IQ, Demographic Background).

Figure 1. Causal model of relationships implied in IGE literature.

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be related on several significant dimensions to schools in the larger Phase I sample as a whole. Thus, some information was collected on five of the six schoolwide variables used in Phase I: IOR, GOS, IOS, GSB (called Teacher Experience in Phase IV), and IPM. Demographic Background appears as a covariate of achievement in the Phase I model but is considered a background variable in Phase IV. In Phase IV, the Classroom Procedures variables were assessed with teacher logs and classroom observations, providing considerably more detailed information than was obtained in Phase I. Pupil Achievement variables were also more extensively measured in Phase IV. A model depicting the Phase IV variables and the anticipated relationships is shown in Figure 2.

Phase I was a large scale survey which included 156 schools. The model was tested using structural equations analysis. The Phase IV Comparative Studies included 19 schools and focusses on two contrasts: (a) The schools using DMP or WDRSD with IGE schools using an alternative mathematics or reading program, and (b) IGE schools using DMP or WDRSD with non-IGE schools using the program.

Variable Definitions and Scores

Demographic Background

Demographic Background (DB) provides a measure of the student population of the school. It is identical to the Phase I measure and is identically scaled. DB is a nominal variable. The distribution of schools into the categories of DB is shown in Table 1 separately for the two studies.

Teacher Experience

This variable is a measure of staff teachers' overall experience in education as well as their experience in IGE schools. Teacher scores of 1-5 points were averaged for each school Results are shown in Table 2.

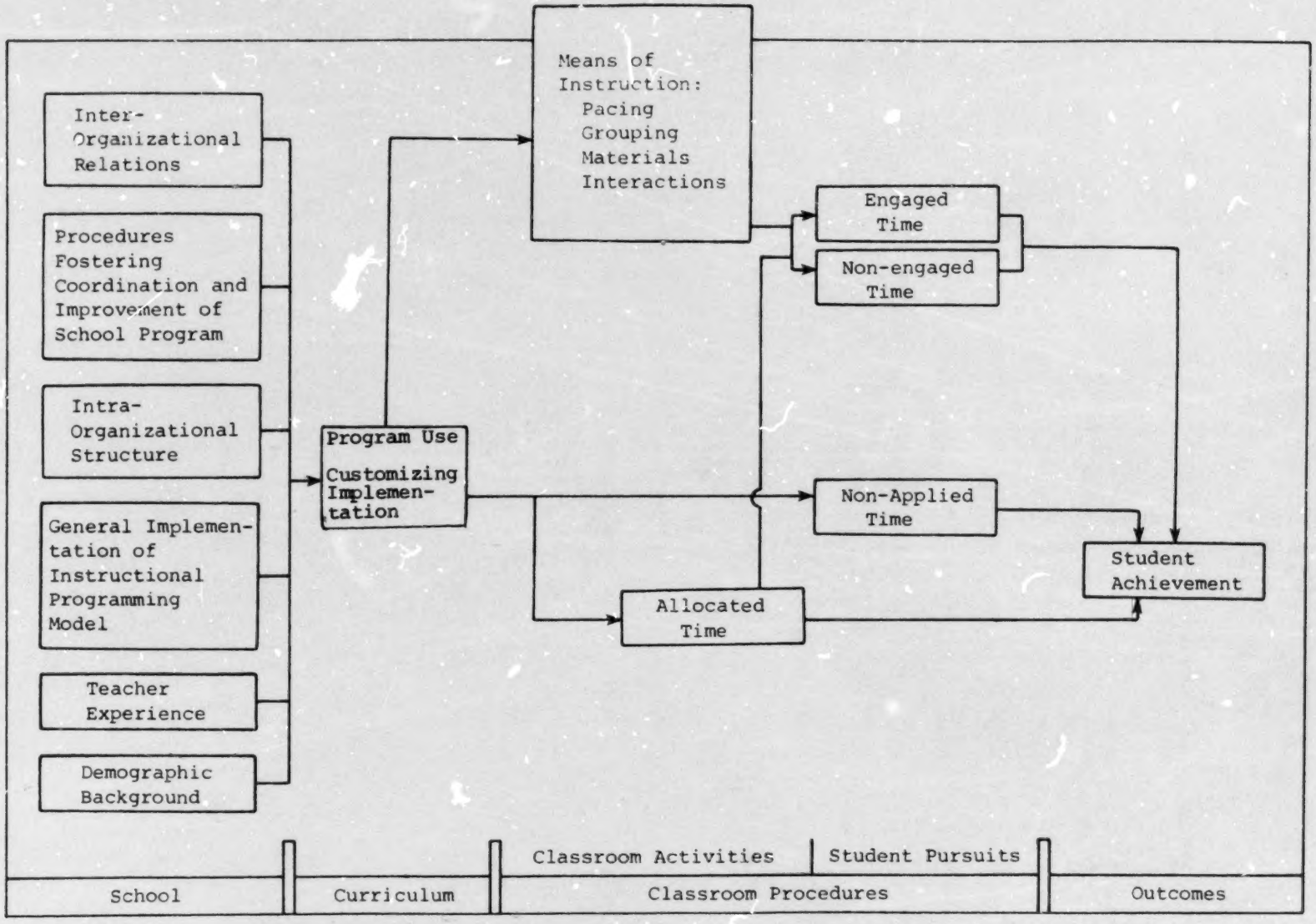

Figure 2. Phase IV model of anticipated relationships between variables.

Table 1

Number of Schools in Demographic Background Categories

DB Category	WDRSD Study	DMP Study
Urban fringe	3	2
Medium city	3	1
Small Place	2	0
Extreme rural	3	4
Low metro	0	1

Table 2

Distribution of Teacher Experience Scores

	Number of Schools	
Score	WDRSD Study	DMP Study
Over 4	5	3
Over 3, but not over 4	6	4
Over 2, but not over 3	0	0
Over 1, but not over 2	0	0
1 or less	0	1

Interorganizational Relations

This variable (IOR) is a measure of school affiliations and staff activities which involve persons and organizations outside of the school. Subscores were developed for (a) school interactions with parents, (b) district support of the curriculum program, and (c) district-wide meetings about program issues and, for IGE schools only, membership in a regional group of IGE schools. The total IOR score of from 0 - 12 points is a sum of the three subscores. Scores for all schools in the Comparative Studies and means for school type in each study are shown in Table 3.

Procedures Fostering Coordination and Improvement of the School Program

This variable (GOS) is a measure of the schoolwide procedures and practices which are designed to promote continuity and refinement of the overall school program. Release planning time as well as new teacher orientation programs and inservice procedures were considered.

Scores for (a) release time for staff planning, (b) orientation programs for new teachers, and (c) inservice procedures were developed. The total GOS score, which can range from 0-24 points, is obtained by summing these subscores. Scores for all schools by type, and means for each type, are given in Table 4.

Intraorganizational Structure

This variable (IOS) is a measure of the school's internal organization and the mechanics of its functioning. Scores indicate the extent to which students and staff are organized into multiaged instructional units and the amount of time which is available for regular meetings of the school's governing body.

Table 5 gives the school scores by type and the mean for each type of school in the Comparative Studies. The scores, which can range from 0-29, are a composite of two subscores: (a) a measure of school organization, and (b) a measure of school governance.

Table 3

Interorganizational Relations Scores

School	Parents (6)	District Support (3)	Meetings (3)	Total (12)
DMP Comparative Study				
IGE/DMP				
440	3.25	2.00	1.00	6.25
593	3.00	3.00	1.00	7.00
Mean	3.12	2.50	1.00	6.62
IGE/non-DMP				
333	4.25	3.00	1.00	8.25
421	5.50	2.00	3.00	10.50
428	1.50	3.00	3.00	7.50
Mean	3.75	2.67	2.33	8.75
Non-IGE/DMP				
762	3.00	0.00	3.00	6.00
904	1.00	0.00	0.00	1.00
905	3.00	0.00	0.00	3.00
Mean	2.33	0.00	1.00	3.33
WDRSD Comparative Study				
IGE/WDRSD				
451	2.50	2.00	3.00	7.50
466	3.00	1.00	1.00	5.00
476	2.50	0.00	1.00	3.50
507	2.00	0.00	1.00	3.00
Mean	2.50	.75	1.50	4.75
IGE/non-WDRSD				
372	2.00	3.00	1.00	6.00
410	2.00	3.00	1.00	6.00
493	0.00	0.00	0.00	0.00
Mean	1.33	2.00	0.67	4.00
Non-IGE/WDRSD				
900	.50	3.00	3.00	6.50
901	2.50	3.00	0.00	5.50
902	1.50	0.00	3.00	4.50
903	3.00	3.00	3.00	9.00
Mean	1.88	2.25	2.25	6.38

Note: Maximum possible scores are given in parentheses.

Table 4

Scores on Variable "Procedures Fostering Coordination and Improvement of the School Program"

School	Release Time (5)	Orientation Programs (10)	Inservice Procedures (9)	Total (24)
DMP Comparative Study				
IGE/DMP				
440	1.50	4.25	9.00	14.75
593	5.00	0.00	6.00	11.00
Mean	3.25	2.12	5.00	12.88
IGE/non-DMP				
333	5.00	5.25	3.00	13.25
421	0.00	3.50	3.00	6.50
428	0.00	1.75	9.00	10.75
Mean	1.67	3.50	5.00	10.17
Non IGE/DMP				
762	1.00	8.00	6.00	15.00
904	0.00	7.00	3.00	10.00
905	1.00	8.00	6.00	15.00
Mean	0.67	7.67	5.00	13.33
WDRSD Comparative Study				
IGE/WDRSD				
451	4.00	9.00	9.00	22.00
466	5.00	6.25	9.00	20.25
476	2.00	4.00	3.00	9.00
507	0.50	5.00	6.00	11.50
Mean	4.00	6.06	6.75	15.69
IGE/non-WDRSD				
372	0.50	9.00	9.00	18.50
410	0.00	4.00	6.00	10.00
493	2.00	7.00	3.00	12.00
Mean	0.83	6.67	6.00	13.50
Non-IGE/WDRSD				
900	0.00	8.00	9.00	17.00
901	0.00	8.75	9.00	17.75
902	1.50	8.75	6.00	16.25
903	1.50	10.00	9.00	19.50
Mean	0.50	8.88	8.25	17.62

Note: Maximum possible scores are given in parentheses.

Table 5

Intraorganizational Structure Scores

School	School organization (15)	School governance (14)	Total (29)
DMP Comparative Study			
IGE/DMP			
440	7.00	10.00	17.00
593	13.00	13.00	26.00
Mean	10.00	11.50	21.50
IGE/non-DMP			
333	14.00	13.00	27.00
421	13.00	13.00	26.00
428	5.00	9.00	14.00
Mean	10.66	11.66	22.33
Non-IGE/DMP			
762	5.00	10.00	15.00
904	0.00	0.00	0.00
905	5.00	0.00	5.00
Mean	2.33	3.33	2.50
WDRSD Comparative Study			
IGE/WDRSD			
451	13.00	7.00	22.00
466	12.00	13.00	25.00
476	13.00	11.00	24.00
507	12.00	10.00	22.00
Mean	12.50	10.25	23.25
IGE/non-WDRSD			
372	12.00	13.00	25.00
410	15.00	7.00	22.00
493	12.00	13.00	25.00
Mean	13.00	11.00	24.00
Non-IGE/WDRSD			
900	5.00	10.00	15.00
901	8.00	8.00	16.00
902	5.00	9.00	14.00
903	9.00	11.00	20.00
Mean	6.75	9.50	16.25

Note: Maximum possible scores are given in parentheses.

General Implementation of the Instructional Programming Model

IPM is a measure of the extent to which the school is organized around the following steps of the IGE Model for Instructional Programming for the Individual Student:

1. setting schoolwide instructional objectives
2. selecting a subset of objectives for children in each unit
3. keeping and using records of assessment results
4. planning for instruction, including short-term grouping procedures
5. providing instruction, including variety in materials and in group sizes
6. assessing mastery of individual objectives
7. planning and evaluating the overall instructional program.

Scores were developed by summing seven subscores, one for each of the seven steps. IPM scores can range from 0-120 points. Table 6 gives these scores by school and gives the means for each type of school in the Comparative Studies.

Scaling Procedures

Demographic Setting (DB)

National Assessment of Educational Progress (NAEP) uses seven categories of size and type of community in reporting results. These seven categories were used to assess DB in Phase I and Phase IV.

In the NAEP results, the patterns of success for students from the seven categories were generally consistent within the reading and mathematics areas and were the same between reading and mathematics. It is this pattern for 9-year-olds--the youngest group in the NAEP sample and the closest to the second and fifth graders tested in Phases I and IV--that is used to scale DB. The scale is shown below.

Table 6

Scores on "General Implementation of the Instructional Programming Model"

School	Steps 1 (6)	2 (18)	3 (18)	4 (13)	5 (40)	6 (13)	7 (12)	Total (120)
DMP Comparative Study								
IGE/DMP								
400	0.00	0.00	17.00	2.50	14.50	12.25	6.50	52.75
593	0.00	2.00	4.00	8.00	10.50	9.50	5.00	39.00
Mean	0.00	1.00	10.50	5.25	12.50	10.88	5.75	45.88
IGE/non-DMP								
333	6.00	2.00	7.00	6.50	22.50	8.00	6.00	58.00
421	5.00	12.00	16.00	3.00	28.00	11.00	5.00	80.00
428	5.00	8.00	16.00	2.00	23.00	11.25	6.50	71.75
Mean	5.33	7.33	13.00	3.83	24.50	10.08	5.83	69.91
Non-IGE/DMP								
762	0.00	12.00	8.00	11.00	31.00	11.00	4.00	77.00
904	0.00	6.00	0.00	10.00	13.00	13.00	4.00	46.00
905	0.00	0.00	0.00	0.00	8.00	5.00	4.00	17.00
Mean	0.00	6.00	2.66	7.00	7.33	5.33	4.00	46.67
WDRSD Comparative Study								
IGE/WDRSD								
451	6.00	11.00	18.00	11.75	31.00	9.50	7.50	94.75
466	5.00	4.00	17.00	11.25	26.00	8.00	4.00	75.25
476	5.00	6.00	15.00	5.75	24.00	8.75	6.50	71.00
507	6.00	18.00	15.00	11.75	17.00	9.50	3.50	80.75
Mean	5.50	9.75	16.25	10.12	24.50	8.94	5.38	80.68
IGE/non-WDRSD								
372	5.00	9.00	17.00	3.00	24.00	9.50	5.00	72.50
410	3.00	6.00	14.00	3.00	33.00	9.50	7.00	75.50
493	0.00	3.00	13.00	0.50	26.50	9.00	4.00	56.00
Mean	2.67	6.00	14.67	2.17	27.83	9.33	5.33	68.00
Non-IGE/WDRSD								
900	6.00	4.00	16.00	10.50	24.00	9.50	2.00	72.00
901	3.00	10.00	18.00	7.50	29.00	8.75	6.00	82.25
902	0.00	6.00	13.00	13.00	25.50	8.75	3.00	69.25
903	5.00	10.00	18.00	10.50	21.00	12.00	6.00	82.50
Mean	3.50	7.50	16.25	10.38	24.88	9.75	4.25	76.50

Note: Maximum possible scores are given in parentheses.

Scaled Value	Category
7	*High metro.* Area in city with a population greater than 150,000 where a high proportion of the residents are in professional or managerial positions.
1	*Low metro.* Area in city with a population greater than 150,000 where a high proportion of the residents are on welfare or are not regularly employed.
6	*Urban fringe.* Community within the metropolitan area of a city with a population greater than 200,000 outside the city limits and thus not in the high or low metro groups.
3	*Main big city.* Community within the city limits of a city population over 200,000 and not included in the high or low metro groups.
5	*Medium city.* City with population between 25,000 and 200,000.
4	*Small place.* Community with a population of less than 25,000.
2	*Extreme rural.* Community with a population under 3,500 where most of the residents are farmers or farm workers.

Teacher Experience

Teacher reports of their years of teaching experience were scaled as follows:

Overall Experience (M01A, R01A)		Plus	IGE Experience (M01B, R01B)	
Response	Scaled Value		Response	Scaled Value
0-2 years	1		1 or more years	1
3-6 years	3			
7 or more years	4			

Results were averaged yielding a school score ranging from 1 to 5 points.

Interorganizational Relations

Interactions with parents. Teachers' reports on the nature and frequency

of parent visitations were assigned the following values:

Visitations are made daily, weekly, or two to three times a month (M01E1, R10E1)	2
Visitations are made for two or more reasons--observe, aide, regular conference, particular problems (M10E2, R10E2)	2
Visitations are made for only one reason--observe, aide, regular conference, particular problem (M10E2, R10E2)	1
There are provisions for a formal explanation of the mathematics (M10E3) or reading (R10E3) program to the parents.	2

Teacher scores were summed and averaged for a school score ranging from 0-6 points.

District support. Data on district support of the school's mathematics or reading curriculum program were obtained from the principal's questionnaire (P08I), with a maximum of 3 possible points:

Response	Scaled Value
The district officially approves of the curriculum program.	1
The district provides funds for workshops or for materials in support of the program.	2

District-wide meetings. All principals reported the frequency of district-wide meetings focussed on curricular issues; however, points were allocated differently for IGE and non-IGE schools, although each group could receive a possible total of 3 points:

Response	Scaled Value
Non-IGE schools	
Meetings on program issues are held 4 or more times a year	3
IGE schools	
Meetings on program issues are held 4 or more times a year.	2
The school participates in a regional group for IGE schools..	1

IOR total. The total score is a sum of the three subscores and has a possible range of from 0 to 12 points.

Procedures Fostering Coordination and Improvement of the School Program Scaling

Release time. Unit leaders reported the numbers of hours per week which were scheduled as release time during which staff member could plan together (U01B):

Response	Scaled Value
3 or more hours	5
2 hours	3
1 hour	1

Orientation programs. The following teacher responses concerning the manner in which new teachers are introduced to the curriculum materials (M10D2, R10D2) were weighted by the principal's report of annual teacher turnover (P02B).

Code	Teacher Response
1	workshops
2	reading, mathematics } specialist and unit leaders
3	other teachers
4	principal
5	someone given general directions
6	unit leader and teachers
7	trial and error
8	don't know
9	we have no new teachers

Responses were weighted by values assigned to reported turnover rate. Scores ranged from 0 to 10 as shown here:

Code of Teacher Response	Scores for Reported Turnover Rate		
	Low	Med	High
1 and 2	10	10	10
1 or 2 plus 3 or 4 or 6	10	10	10
8 and 9	10	0	0
1 or 2; any two of 3, 4, 6	8	7	6
3 or 4 or 6	7	6	5
7	0	0	0

Inservice procedures. The availability of each of three mathematics or reading inservice procedures (non-credit preschool workshops in the school and district--P06A; non-credit and credit staff development activities beyond the school district--P06B; staff development time in the building--P06C) was assigned 3 points, for a possible total of 9 for this section.

GOS total. A total of 24 points was possible, 5 from Release Time, 10 from Orientation Programs, and 9 from Inservice Procedures.

Intraorganizational Structure

Scaling

Scores for school governance and school organization were determined separately, as described below, and then scores on each portion were summed, yielding a school-wide IOS score of up to 29 points.

School organization. Unit leaders indicated how their school organization was best described (UDIA): multigrade units, self-contained classrooms with some team teaching and coordination within grade levels, or self-contained classrooms. No points were given for reports of self-contained classrooms. Reports

of self-contained classrooms in addition to some team teaching were assigned 5 points unless additional information has been provided by the principal on a chart of school organization. All points for reports of multigrade units were developed from that chart.

On the organization chart, principals reported grade range of units or teams (P01EB), number of pupils per unit (P01D), and number of units holding regular weekly planning meetings (P01EF).

Multigrade units. For each unit which was reported to be composed of pupils from more than one grade, 5 points were assigned; points were summed and divided by the number of units resulting in a school average of from 0 to 5 points.

Unit size. For each unit of 100-125 pupils, 5 points were assigned; for units of 75-99 or 126-150 pupils, 3 points were assigned; for all other unit sizes 1 point was given. Points for all units were summed and divided by the number of units to obtain a school average of from 1 to 5 points.

Unit planning. For each unit reported to have regular weekly planning meetings, 5 points were assigned; points were summed and divided by the number of units for a school average of from 0 to 5 points.

On this subsection, points were summed for a total of from 0 to 15.

School governance. Information on school governance was obtained from the principal and scored as follows:

Response	Scaled Value
Decision-making Group	
Presence of a decision-making body including a subgroup of faculty rather than the principal alone (P03A1)	3

Response	Scaled Value
Membership of that group	
Principal (P03A2)	3
All unit leaders only; staff teachers only in schools not having unit leaders (P03A3)	3
Some unit leaders only	1
One or more parent representatives	1
Scheduling of group meetings	
4 or more hours per month	4
2 to 3 hours per month	2

Points were summed and averaged with school scores ranging from 0-14 points.

IOS total. Scores for school governance and school organization were determined separately, as described above, and then summed, yielding a school-wide IOS score of up to 29 points.

General Implementation of the Instructional Programming Model

Scaling

Step 1 - Schoolwide objectives. This section deals with the development of relatively specific statements of objectives which would be the focus of a 2-4 week instructional period. Each principal reported on both the adoption of such schoolwide instructional objectives for reading or mathematics and the extent to which published sources (curriculums, objectives books, catalogs) were used during the adoption process. Eight items were included (P04A2, P04C1, P04C3, P04A1, P04B1, P04B2, P04B3) and responses were scored as follows:

Response	Scaled Value
School-wide objectives were adapted from published curriculums and objectives books or catalogs.	6

Response	Scaled Value
School-wide objectives were adapted from either published curriculums or objectives books or catalogs.	5
School-wide objectives were developed but no information about the use of published materials was provided.	3

Step 2 - Subsets of objectives. Generally a specific subset of the school-wide objectives are scheduled to be covered by each unit during the school year. Unit leaders reported the maximum number of such objectives which a child could attain in a Grade 2 or Grade 5 unit (U04C, U04A) and 4 to 12 points were assigned.

Response	Scaled Value
20-59 objectives	12
60-149 objectives	8
10-19 objectives	4

In addition, unit leaders who reported that there were minimum mastery requirements for all students and that a learner could not leave the curriculum area without satisfying these requirements (U02B3, U02C3, U02B1, U02C1) received another 6 points.

Thus a school might receive 12 points for number of objectives and 6 points for minimum requirements. Values in each section were summed and then Grade 2 and Grade 5 reports were averaged for a school score ranging from 0 to 18.

Step 3 - Record keeping. Both the types of recording devices and the nature of records being kept were considered in this section.

Unit leaders reported whether or not achievement records for specific instructional objectives were maintained (U03A3, U03A1), with 10 points assigned for affirmative responses; points for the Grade 2 and Grade 5 unit were averaged for 10 possible points for the school.

Teachers also reported on the exact nature of the records (M07A, R07A) and on the regularity of updating procedures (M07D, R07D). Four points were assigned if any raw score, percentage, skill mastery, or general category of test scores was recorded. An additional 4 points were assigned if records were reported to be regularly updated. Points for all Grade 2 and Grade 5 teachers were averaged for up to 8 points for the school.

Points from unit reports and from teacher reports were summed for a school record keeping score of from 0 to 18 points.

Step 4 - Planning. In the planning section, frequency of regrouping and type of regrouping procedures were scaled.

Both unit leaders and teachers reported the frequency with which students were regrouped on the basis of a common need for instruction on a specific objective (U02A3, M06Df, U02A1, R06Df) and points were assigned as follows:

Response	Scaled Value
Regrouping occurs montly or every 2-3 weeks	4
Regrouping occurs weekly or quarterly	2

In cases of disagreement among teachers and unit leaders, the smaller number of points was used in calculating the score.

Teacher's reports on grouping procedures were scored as follows, then summed and averaged for a possible total of 9.

Response	Scaled Value
Groups are formed on the basis of topics or objectives not mastered (M06D, R06D).	3
Multi-age, cross-graded groups are used (M06Dg, R06Dg).	3
90% or more of the students are regularly grouped (M06DH, R06DH).	3

Response	Scaled Value
Midyear transfer students are grouped beginning where the other students are (M09H, R09H).	-3

Overall, a total of 13 points was possible for Step 4.

Step 5 - Instruction. Both unit leaders and teachers reported on the amount of instructional time spent in various group sizes, the variation in learners' rates of progress, and the variety in instructional materials.

The following percentages of instructional time in each group size were scaled as described below:

Response	Scaled Value
20% or less time doing individual work (M06B1, R06B1).	4
30-89% in groups of 2-7 with 1 instructor (U02F1).	3
30-89% in groups of 8-20 with 1 instructor (U02F2)	3
0-19% in groups of 21-40 with 1 or more instructors (U02F3).	3
0-9% in groups of more than 40 with 1 or more instructors (UD2F4)	3

Differences in learners' rates of progress (U02E) were scored as follows"

Response	Scaled Value
Most learners progress at different rates.	4
Groups progress at different rates	2
Some learners progress faster or slower than the majority.	1

Unit leaders also provided information about the variety of instructional

materials and the extent of their use.

Variety of materials used:

Manipulatives (U05C)

Response	Scaled Value
3-4 types	6
1-2 types	2

No-media situations (U05D)

Response	Scaled Value
2-3 types	2

Reading writing materials (U05A)

Response	Scaled Value
4-6 types	6
2-3 types	4
1 type	2

Audiovisual materials (U05B)

Response	Scaled Value
4-7 types	6
2-3 types	4
1 type	2

In the DMP study, for reports that manipulatives were not being used at least 10% of the time, scores for manipulatives were reduced by half, resulting in scores ranging from 1-3. Similarly, in the WDRSD study, if only reading-writing materials were used, scores for those materials were reduced by half.

In summary, the Step 5 instruction subscore ranges from 0 to 40 points and is the sum of 4 points for the average of teachers' reports about amount of time in individual work, a maximum of 16 points for the average of unit leaders' reports about percentage of time in other learning groups, and a maximum of 20 points for the average of unit leaders' reports about materials use.

Step 6 - Assessment. Information was obtained on the type of assessment materials which were used as well as the frequency of assessment in the curriculum area.

Six types of assessment materials were reported--pretests (U03C1), internal tests (U03C2), posttests (U03C3), conferences (U03C4), student products (U03C5), and classroom observations (U03C6)--and points were assigned to the following combinations:

Response	Scaled Value
Pretests, posttests and two additional types	10
Pretests and posttests only	7
Any three types excluding pretests and posttests	5
Any two types excluding pretests and posttests	3

If teachers reported not using pretests, 2 points were subtracted from unit leader responses before averaging. Teachers' reports on the frequency with which tests were administered in the curriculum area (M11A, R11A) were assigned the following values:

Response	Scaled Value
For reading and math, tests are administered every 2, 3, or 4 weeks.	3
For math, tests are administered whenever topics or units were completed.	3

The assessment subscore of 13 points is thus the sum of 10 possible points for the average of unit leaders' reports of types of assessments used and 3 possible points for teachers' reports of the frequency of test administration.

Step 7 - Overall instructional planning. Teachers reporting that all students received skill instruction in the curriculum areas (M06C, R06C) or that

only children with educational or learning disabilities were not instructed in particularly difficult skills, received 4 points. Unit leaders reporting that regularly scheduled unit meetings were held (U01C1) and that at least 50% of the meeting time was devoted to instructional planning (U01D1) received 4 points. They received another 2 points if at least 10% was spent in evaluation (U01D3) and 2 points if some time for staff inservice (U01D5) was scheduled during unit meetings. From the total of 8 points, 1 point was subtracted if over 20% was spent on managerial and administrative arrangements (U01D2) and more than 10% was spent on individual staff preparation (U01D4).

The evaluation subscore of 12 points is thus the sum of 4 possible points for the average of teachers' reports about skill instruction for all students and a maximum of 8 points for the average of unit leaders' reports about meeting content.

Composite

The seven subscores were summed for a composite score with a maximum of 120 points.

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Appendix

Questionnaire Items Used in Scaling Background Variables

In this appendix items are arranged by variable. The letters and numbers to the left of the item identify the respondent and the location of the item in the outlined questionnaire. Respondents are indicated by the first letter of this identification code, as follows:

P	principal, both studies
U	unit leader, both studies
M	mathematics teacher, DMP study
R	reading teacher, WDRSD study

Demographic Background

P09 Phase IV staff reported student demographic background using definitions from Phase I

(0) High metro
(1) Low metro
(2) Urban fringe
(3) Main big city
(4) Medium city
(5) Small place
(6) Extreme rural

Teacher Experience

M01A and R01A — For how many years have you taught?

(0) 0-2	(5) 21-25
(1) 3-6	(6) 26-30
(2) 7-10	(7) 31-35
(3) 11-15	(8) 36-40
(4) 16-20	(9) 41 or more

M01B R01B — How many of these years, if any, have been in any IGE school?

(0) 0	(5) 5
(1) 1	(6) 6
(2) 2	(7) 7
(3) 3	(8) 8
(4) 4	(9) 9 or more

Interorganizational Relations

Parents

M10E1 and R10E1

How often do parents visit your classroom?

(0) never
(1) every day
(2) once a week
(3) 2-3 times a month
(4) less often

M10E2 and R10E2

Why do parents visit

(1) observe
(2) aide
(3) particular problem/occasion
(4) conferences

R10E3

Have you or your school explained the Design (reading) program to the parents of your class?

(0) no
(1) once
(2) yes
(3) many times
(4) don't know; program there before teacher was

M10E3

Have you or your school explained DMP (the math program) to the parents of your class?

(0) no
(1) once
(2) yes
(3) many times
(4) don't know; program there before teacher was

P08I

What support have you received from the district level regarding your reading/math program? (Multiple responses possible.)

(0) Approved by Board of Education
(1) Approved by reading committee
(2) Good feedback from parents
(3) Workshops, inservice training
(4) Funding for more materials
(5) Not much

Affiliation with Other Schools

Staff of some schools take many opportunities to relate to people and organizations outside of their own building. The opposite is also true. I'd like some information about the kinds of activities available to you and your staff.

P05 A. For non-IGE Schools

1. Is there more than one school in your district, in the area under the jurisdiction of your school board?

(1) YES (0) NO

2. If yes, do you have meetings with representatives from these schools and district office personnel to discuss program issues?

(1) YES (0) NO

3. If yes, how often does this group meet?

(1) less than once a year
(2) once a year
(3) twice a year
(4) three times a year
(5) four times a year
(6) more than four times a year

P05 B. For IGE Schools

1. Is there more than one IGE school in your district, in the area under the jurisdiction of your school board?

(1) YES (0) NO (Go to 4)

2. Do you have meetings about IGE with representatives from only these IGE schools and district office personnel? (This group might be called the System-wide Program Committee.)

(1) YES (0) NO (Go to 4)

Affiliation with Other Schools

3. How often does this group meet?

(1) less than once a year	(4) three times a year
(2) once a year	(5) four times a year
(3) twice a year	(6) more than four times a year

4. Does your school belong to any other group of IGE schools (League, Network regional group, PACT, HUB) which includes IGE schools that are not in your school district or school system?

(1) YES (0) NO

Procedures Fostering Coordination and Improvement of the School Program

Inservice Programs and Procedures

M10D2 and R10D2

How are new teachers introduced to the materials?

(1) workshops
(2) math/reading specialist and unit leaders
(3) other teachers
(4) principal
(5) someone given general directions
(6) unit leaders and teachers
(7) trial and error
(8) don't know
(9) we have no new teachers

What provisions for inservice in reading (for reading Phase IV schools) or math (for math Phase IV schools) are made over the year?

P06A (1) YES (0) NO A. Non-credit workshops and other staff development activities involving only school and district personnel are arranged for preceding the opening of school and during the school year.

P06B (1) YES (0) NO B. The entire staff of your school, or selected members as appropriate, participate in non-credit staff development activities and in credit courses.

P06C (1) YES (0) NO C. The governing body (IIC for IGE schools) cooperates to provide time during the school year for staff development in the amount needed for effective education.

P02B

Some schools have a high teaching staff turnover while others are fairly stable. How would you describe the annual turnover rate?

(0) Low, 0-15%
(1) Average, 16-30%
(2) High, over 30%

Release Planning Time

U01B How many hours per week of release time are currently scheduled during the school day for unit staff (team) members to plan together?

(0) 0 hours
(1) 1 hour
(2) 2 hours
(3) 3 hours
(4) 4 hours
(5) 5 hours
(6) 6 hours
(7) 7 hours
(8) 8 hours
(9) 9 or more hours

Intraorganizational Structure

School Governance

P03A Decision making within schools varies from being solely a principal's activity to being an activity of a formally established subgroup of faculty. Do you have such a formal group? (IGE schools would call the group Instructional Improvement Committee, IIC, or Program Improvement Committee, PIC.)

NO Describe leadership group/person or governing body (formal or informal) for your school.

YES Who are permanent and regular members of the governing group?

Principal (0)
(1)

Unit (team) leaders
(1) All
(2) Some
(3) None
(4) We have no team leaders.

Regular staff teachers
(0) No
(1) Yes

One or more parent representations
(0) No
(1) Yes

P03B (If yes to A)

About how many hours per month are scheduled for regular meetings for the governing group?

(0) 1/2 hour
(1) 1 hour
(2) 2 hours
(3) 3 hours
(4) 4 hours
(5) 5 hours
(6) 6 hours
(7) 7 hours
(8) 8 hours
(9) 9 or more hours

School Organization

U01A Which best describes your school's organization?

(1) Multigrade units.
(2) Self-contained classrooms with some team teaching and coordination within grade levels.
(3) Self-contained classrooms.

P01A The chart below is for regular*, academic**, units***, and teachers only.

*"regular" means not composed exclusively of special education pupils.
**"academic" means not composed exclusively of special area teachers (art, music, etc.).
***"unit" describes a "learning community" as well; similarly, "unit leader" refers to "learning community."

A. How many regular, academic units are in your school? _____

On the chart below, describe each regular, academic unit according to the questions at the left. Exclude special student teachers/interns, and aides. (If there are more than 7 regular, academic units please attach a page listing information for those units.)

Units:	Unit 1	Unit 2	Unit 3	Unit 4	Unit 7
B. Grade range (for example K-1, 2-3)					
D. Number of pupils (approximate)					
F. Does this unit staff have regular planning meetings at least once a week?	__1.Yes __2.No	__1.Yes __2.No	__1.Yes __2.No	__1.Yes __2.No	__1.Yes __2.No

General Implementation of the Instructional Programming Model

School-wide Objectives

P04A1 Has your school adopted a set of school-wide instructional Objectives for reading?

(0) No
(1) Yes

P04A2 for math?

(0) No
(1) Yes

P04B1 How were the specific instructional reading objectives identified?

Taken from published curriculum(s)

(0) Directly
(1) With adaptation
(2) Not at all

Taken from objectives book(s) or catalog(s)

(0) Directly
(1) With adaptation
(2) Not at all

If Math Phase IV School, how were the specific math instructional objectives identified?

P04C1 Taken from published curriculum(s)

(0) Directly
(1) With adaptation
(2) Not at all

P04C2 Taken from objectives book(s) or catalog(s)

(0) Directly
(1) With adaptation
(2) Not at all

Subsets of Objectives

What is the maximum number of specific instructional objectives an individual grade 2 or 5 (whichever is appropriate) student in your unit (class) could attain in these curriculum areas in one school year?

U04A Reading

(0) 0-9 objectives
(1) 10-19 objectives
(2) 20-39 objectives
(3) 40-59 objectives
(4) 60-99 objectives
(5) 100-149 objectives
(6) 150-249 objectives
(7) 250-349 objectives
(8) 350 or more objectives
(9) *Don't know*

U04C Mathematics

(0) 0-9 objectives
(1) 10-19 objectives
(2) 20-39 objectives
(3) 40-59 objectives
(4) 60-99 objectives
(5) 100-149 objectives
(6) 150-249 objectives
(7) 250-349 objectives
(8) 350 or more objectives
(9) *Don't know*

Are there certain minimum requirements that all students must master in these areas?

U02B1 Reading (0) NO (1) YES

U02B3 Mathematics (0) NO (1) YES

Can a learner leave these curriculum areas without satisfying minimum requirements?

U02C1 Reading (0) NO (1) YES

U02C3 Mathematics (0) NO (1) YES

Record Keeping

Is an individual record of achievement (for example, profile card, chart, computer system) of specific instructional objectives kept for each student in your unit?

U03A1 Reading (0) NO (1) YES

U03A3 Mathematics (0) NO (1) YES

R07A What is recorded on instruction and mastery of WDRSD (reading) skills?

(1) raw score
(2) % score
(3) skill mastery
(4) date
(5) number of times (reteaching)
(6) keep individual papers
(7) test score
(8) general comments

M07A — What is recorded on instruction and mastery of DMP (math) objectives?

(1) raw score
(2) % score
(3) skill mastery
(4) date
(5) number of times (reteaching)
(6) keep individual papers
(7) test score (general category)
(8) general comments

R07D and M07D — Are the records updated regularly?

(0) No
(1) Yes

Planning

How often are the students in your unit/class regrouped on the basis of a common need for work on a specific instructional objective in these curriculum areas?

U02A1 — Reading

(0) Daily
(1) Weekly
(2) Every 2-3 weeks
(3) Monthly
(4) Quarterly
(5) At semester
(6) Groups remain basically the same throughout the year

U02A3 — Mathematics

(0) Daily
(1) Weekly
(2) Every 2-3 weeks
(3) Monthly
(4) Quarterly
(5) At semester
(6) Groups remain basically the same throughout the year

R06Df How often do you form new groups?

(0) daily
(1) weekly
(2) 2-3 weeks
(3) monthly
(4) quarterly
(5) at semester
(6) annually
(7) as needed

M06Df How often do your form new groups?

(0) daily
(1) weekly
(2) 2-3 weeks
(3) monthly
(4) quarterly
(5) at semester
(6) annually
(7) when they finish a topic

R06D How are students grouped for instruction in Reading skills?

_____1. by ability
_____2. by age
_____3. by topic or objectives not mastered

M06D How are students grouped for instruction in Math?

_____1. by ability
_____2. by age
_____3. by topic or objectives not mastered

R06Dg and M06Dg Do you cross-age and cross-grade in skill grouping?

(0) No
(1) Yes

R06Dh and M06Dh

What percent of the students are grouped?

_____%

R09H and M09H

How do you handle new pupils who transfer into your class during the middle of the year?

(1) Give test to determine skill level
(2) Teacher observation
(3) Fit into skill groups; look at records if sent with child
(4) Start them where others are

Instruction

R06B

During instruction in Design (reading skills), approximately what percentage of the time do students work in each of the following groupings?

_____% as individuals
_____% in pairs
_____% in small groups
_____% in large groups

M06B

During instruction in DMP (math objectives), approximately what percentage of time do students work in each of the following groups?

_____% as individuals
_____% in pairs
_____% in small groups
_____% in large groups

What percent of instructional time is spent in each size of grouping for each content area? (A report of 100% in one kind of group was recorded as 99 for that kind and 00 for all others.)

		Reading	Math
U02F1	Group of 2-7 learners, one instructor	____	____
U02F2	Group of 8-20 learners, one instructor	____	____
U02F3	Group of 21-40 learners, one or more instructors	____	____
U02F4	Over 40 learners, one or more instructors	____	____

U02E To what extent are there differences among the learners' rate of progress in these curricular areas?

Reading	Math	
(0)	(0)	Not at all
(1)	(1)	Some progress faster or slower than the majority
(2)	(2)	Groups move through the program at different rates
(3)	(3)	Most learners differ in their rates of progress
(4)	(4)	All learners progress at different rates of progress

U05A Listed below are six types of reading-writing materials. Which are used in each curriculum area? (Indicate the one most often used by a 1, the next one most used by a 2, etc.)

	Reading	Math
Single textbook	____	____
Multitexts	____	____
Programmed materials	____	____
Workbooks	____	____
Computer terminal	____	____
Materials written by learners	____	____
How many types of reading-writing material are used in each curriculum area?	____	____

U05B Listed below are seven types of audio-visual materials. Which are used in each curriculum area?

	Reading	Math
Films	____	____
Filmstrips	____	____
Tapes	____	____
Records	____	____
Television	____	____
Overhead projectors	____	____
Videotapes	____	____
How many types of audio-visual materials are used in each curriculum area?	____	____

U05C Listed below are four types of manipulation materials. Which are used in each curriculum area?

	Reading	Math
Building tools	____	____
Games	____	____
2-dimensional materials	____	____
3-dimensional materials	____	____
How many types of manipulatives are used in each curriculum area?	____	____

U05D Listed below are three types of no media situations. Which are used in each curriculum area?

	Reading	Math
Discussions	____	____
Lectures	____	____
Learner's meditations (thinking alone without books, etc.)	____	____
How many types of no media situations are used in each curriculum area?	____	____

U05E About what percentage of the learner's instructional time in this area is spent using the types of materials/media below? (Reports of 100% for one type were recorded as 99 for that type and 00 for all others.)

	Reading	Math
Reading-writing materials	____	____
Audio-visual materials	____	____
Manipulative materials	____	____
No materials/media situations	____	____
	100%	100%

Assessment

Check which type of assessment is used to assess learner's skills and concepts in these curriculum areas. (For each type of assessment, 1 indicates reported use and 0 reported nonuse.)

		Reading	Math
U03C1	Pretest (tests before instruction on a topic)	____	____
U03C2	Internal tests (tests while instruction occurs on a topic)	____	____
U03C3	Post tests (tests after instruction on a topic)	____	____
U03C4	Conferences	____	____
U03C5	Student products (worksheets, projects)	____	____
U03C6	Classroom observations	____	____

R11B and M11B — Are students pretested?

(0) No
(1) Yes

R11A — How often are Design (reading skills) tests administered?

(1) weekly
(2) 2 weeks
(3) 3 weeks
(4) month
(5) 6 weeks
(6) less frequently

M11A — How often are DMP (math objectives) tests administered?

(1) weekly
(2) 2 weeks
(3) 3 weeks
(4) month
(5) 6 weeks
(6) whenever topics or units are finished

Overall Instructional Planning

R06C — Do all students receive instruction in reading skills?

(0) No
(1) Yes

M06C — Do all students receive instruction in math?

(0) No
(1) Yes

R06C1 and M06C1

If no, why not?

(1) Some very low kids in upper grades don't have a regular reading/math class.
(2) ED, LD, etc. kids--some don't attend if skill is too difficult.
(3) Some really high kids don't need instruction if they passed test.

U01C1

Do you have regularly scheduled unit (team) meetings?

(0) No
(1) Yes

If yes to C1, record what percent of time of the unit (team) meeting is spent with each activity.

U01D1	Planning for instruction (work on materials, grouping)	_____% of time
U01D2	Making managerial and administrative arrangements (managing time, space, equipment, personnel)	_____% of time
U01D3	Evaluating student and staff efforts	_____% of time
U01D4	Individual staff preparation (time set aside during unit meetings for teachers to work alone)	_____% of time
U01D5	Inservice of unit staff	_____% of time
	Other (please specify)	_____% of time

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